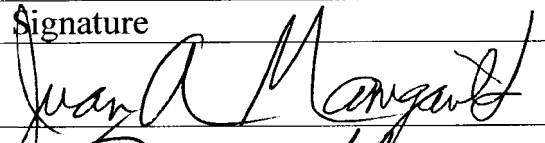
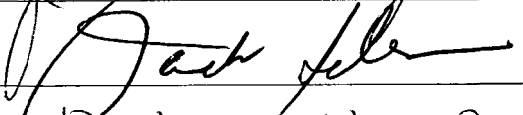
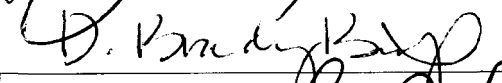
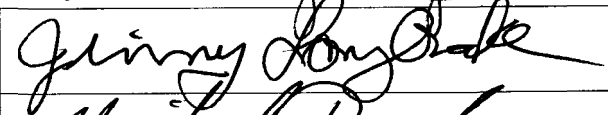

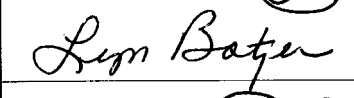


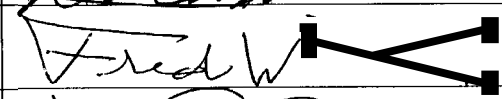
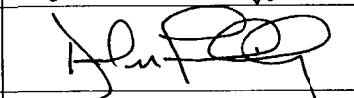
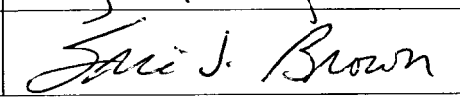


Economic Development Region # 2 : Northern Indiana

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Signature Page.

Name	Industry	Title & Company	Signature
Juan Manigault	Core Agent	President and CEO - Northern Indiana Workforce Investment Board	
Jack Isles	Advanced Manufacturing	General Manager Bull Moose Tube Company	
Brad Bishop	Life Sciences	Director of Corporate Communications Zimmer, Inc.	
Jinny Longbrake	Health Care	Director of Human Resources Memorial Health Systems	
Michael Busch	Economic Development	Executive Director Fulton Economic Development Corporation	
Lyn Batzer	Education	Dean of Academic Affairs Ivy Tech State College	
Dave Gibson	Insurance	Chairman of the Board Gibson Insurance Group	
Michael Patton	CBO FBO	President – Urban League of South Bend & St. Joseph County	
Federico Thon	CBO/FBO	Assistant to the Mayor of South Bend & Member of Hispanic Chamber of Commerce	
David Findlay	Financial Services	Executive Vice President and CFO Lake City Bank	
Eric Brown	Organized Labor	Vice President, AFL-CIO Central Labor Council - Sheet Metal Workers Local 20	

Northern Indiana Workforce Investment Board, Inc.
Strategic Skills Initiative
Research Grant Application

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Northern Indiana Workforce Investment Board, Inc.
Strategic Skills Initiative
Executive Summary

The Northern Indiana Strategic Skills Initiative is part of a state-wide effort under the leadership of the Indiana Department of Workforce Development. The Initiative is designed to achieve economic growth for Indiana communities and increased personal wealth for Indiana's citizenry. The Northern Indiana region is committed to providing an on-going capacity for workforce and economic related research that achieves continued and expanded economic growth and increased personal wealth for our communities and our citizens.

1. Consortia Executive Group Members

- a. Juan Manigault, Core Agent, Northern Indiana Workforce Investment Board
- b. Jack Isles, General Manager, Bull Moose Tube Company
- c. Jinny Longbrake, Director of Human Resources, Memorial Hospital
- d. Brad Bishop, Director of Corporate Communications, Zimmer Corporation
- e. Michael Busch, Executive Director, Fulton Economic Development Corporation
- f. Lyn Batzer, Dean of Academic Affairs, Ivy Tech Community College
- g. Dave Gibson, Chairman of the Board, Gibson Insurance Group
- h. Michael Patton, President, Urban League of South Bend and St. Joseph County
- i. Federico Thon, Member, Hispanic Chamber of Commerce
- j. David Findlay, Executive Vice President and CFO, Lake City Bank
- k. Eric Brown, Vice President, AFL-CIO Central Labor Council

2. Depth of Involvement

The Northern Indiana Strategic Skills Initiative (SSI) will build upon existing and add new relationships to assure that the Northern Indiana region is primed for continued economic growth. The Executive Group has agreed to form a 21st Century Strategic Skills Consortium to both address the specific requirements of the SSI Research phase and to oversee the implementation of solutions that are linked to a broader regional agenda that involve economic and governmental initiatives.

The first meeting of the Consortium is scheduled for August 30, 2005. The list of invitees is included as Attachment A.

In addition, the Research phase will focus on the involvement of all Chambers of Commerce and economic development entities by implementing a common strategy that focuses on business retention. This effort will compliment the SSI. Since 70% of job growth is directly linked to existing businesses, the SSI and business retention component will provide a common approach to supporting continued economic growth in the region.

3. Description of Activities

The Northern Indiana region is applying for \$396,978 to conduct an extensive research phase consisting of both primary and secondary activities to identify occupational and skill shortages, root causes and solutions that effectively address regional needs. In addition, Northern Indiana will institutionalize the processes conducted through SSI, to build a capacity to deliver ongoing “workforce and economic related reconnaissance and intelligence” to the business community.

Industry sectors that are major drivers of the Northern Indiana economy will be identified based on analysis of the secondary research provided by Workforce Associates, as well as current research conducted by the Northern Indiana Workforce Investment Board, Economy.Com, and through a joint venture between the University of Notre Dame’s Economics Department, Notre Dame’s Mendoza College of Business, Indiana University South Bend’s School of Business and School of Public and Environmental Affairs .

These industry sectors will then be analyzed to determine specific occupational and skill shortages including a projection of the number of positions that will be unfilled over a short-term (two years) and a long-term (five and ten years) period. This will provide a “line of sight” that will serve as the basis for identification of Solutions that will be prioritized for implementation in the two year Solutions Phase.

Primary research activities, including surveys, focus groups and interviews will determine the specifics related to root causes, and serve as a basis for the identification of specific regional solutions that address a prioritized listing of root causes.

The final outcome of the research phase is a planning document that aligns a regional agenda between government, business and the community that serves as a foundation for future economic growth for the region, resulting in increased wages and income for individuals.

Northern Indiana Workforce Investment Board, Inc.
Strategic Skills Initiative
Work Statement

The Northern Indiana Strategic Skills Initiative is part of a state-wide effort under the leadership of the Indiana Department of Workforce Development. The Initiative is designed to achieve economic growth for Indiana communities and increased personal wealth for Indiana's citizenry. The Northern Indiana region is committed to providing an on-going capacity for workforce and economic related research that achieves continued and expanded economic growth and increased personal wealth for our communities and our citizens.

The following Statement of Work provides a basic overview of the activities to be conducted under this Strategic Skills Initiative.

1. Staff Qualifications

The Northern Indiana Strategic Skills Initiative will employ the following staff positions. The qualifications and credentials of these individuals include:

- a. Juan A Manigault, President and CEO/Core Agent. Mr. Manigault has over twenty years experience as an executive leader in workforce and economic development in Northern Indiana. He has a B.A. Degree in English from the University of Notre Dame, and a M.S.B.A. Degree from Indiana University with an emphasis in Organizational Development and Management. Mr. Manigault has over twenty years experience in the private, public and non-profit sectors. His areas of expertise include leadership development, strategic planning, technology utilization, collaboration and visioning. He is recognized as a leader in Indiana having been appointed by three different Governors to serve in a variety of roles including as a member of the Indiana Human Resource Investment Council, Indiana School-to-Work Advisory Council, Governor's Commission on Workforce Preparation, Indiana Career Education Advisory Council, the Governor's Task Force on Economic Development and the Indiana Adult Literacy Coalition. He is currently a member of the Board of Directors of Teachers Credit Union, the Country's 48th largest Credit Union. He will be responsible for providing overall leadership and attainment of outcomes to the Initiative.
- b. Dan Hendricks, Vice President of Strategic Research and Development. Mr. Hendricks has been hired to provide the primary day-to-day oversight of the Initiative. He has over nine years in the private sector, serving in a variety of training and operational related capacities focusing on productivity improvement and implementation of various ISO standards focusing on quality and continuous improvement. Mr. Hendricks also has six years experience as Training Manager with the Business and Industry Training Division at Ivy Tech State College, North Central Region. Mr. Hendricks has a M.S. Degree in Management degree from

Louis University in Chicago, and a B.A. Degree in Business from Spring Arbor College. He has taught or published articles in Safety Standards for the Workplace, based on OSHA requirements, Quality Management Systems (QMS), based on ISO 9001, 9002 and QS 9000, Preferred Supplier Quality Auditing System, based on ISO 9001, Influencing Relationships: A Skill Building Program, Facilitating Problem Solving, Tools, and Techniques, and Comparing Job Satisfaction with Behavioral Traits.

- c. Research Director position is not filled at the present time. This position will be responsible for coordinating the various secondary and primary research activities with the University Joint Initiative, the Corporation for a Skilled Workforce and with Walker Information. The individual filling this position will organize and compile the research questions for focus groups, surveys and company/sector specific interviews. In addition, the position will summarize the research by presenting findings for discussion at Consortium meetings. The individual filling this position will need to have a minimum of a Masters level degree with experience in research activities, the ability to write clearly and succinctly.
- d. Administrative Assistant position will provide a variety of administrative and clerical support functions to the Initiative including scheduling of meetings, coordinating the work schedule, handling mailings and communications with the various publics involved, and related duties. This position will require an experienced individual with a minimum of an Associates Degree.

2. Coordination Across Current WIB Boundaries

The 21st Century Skills Consortium will include representation from all five counties of the SSI Economic Growth Region from business, education, organized labor and community organizations. The first meeting of the Consortium is scheduled for August 30, 2005. The Consortium composition will assure that the SSI is coordinated across all counties resulting in the development of regional reports that address occupational skill shortages, root causes and identify solutions that address the root causes. A copy of the invitation list is included as Addendum A.

While the regional consortium will meet to finalize and adopt each of the three required reports, specific focus groups, surveys and related activities will be done at the county level to assure participation of local county business, education and community leaders, and to receive the feedback and information required for developing each of the three specific reports.

The Economic Growth Region adds Fulton County to the current four county Northern Indiana region. The Core Agent has had meetings with the Executive Director of the Fulton Economic Development Corporation and the President of the Rochester Chamber of Commerce to discuss the Initiative. Both entities have agreed to support the Initiative and to assist in identifying companies to be involved in the various activities. In addition,

the Core Agent has met with the Mayor of Rochester to brief him on the SSI. Additional meetings with the Fulton County Board of Commissioners are being scheduled.

The Core Agent has also scheduled meetings with local elected officials in Elkhart, Kosciuko, Marshall and St. Joseph Counties to brief them on SSI and the impact that the initiative will have on economic and workforce development in the region. In addition to briefing meetings, the Core Agent has been interviewed for articles that appeared in the South Bend Tribune newspaper and the Tribune Business Weekly. Additional articles are planned for the Elkhart Truth, the Goshen News, the Warsaw Times-Union, the Plymouth Pilot and the Rochester Sentinel. These articles will assure that the general public is aware of the Initiative and its findings and outcomes.

3. Regional Sector and Industry Representation and Involvement

Regional sector and industry representation and involvement will begin at the Consortium level and extend to surveys, focus groups and interviews. A summary of our plans to include this representation are as follows:

- a. Primary industry representation at the Executive Group level includes individuals from Advanced Manufacturing, Life Sciences and Health Care. In addition, we have included a financial services and an insurance sector representatives who can provide access to additional regional leadership in the above referenced sectors, plus the information technology, transportation/distribution/logistics, motor sports, and advanced agriculture sectors.
- b. The Consortium membership includes additional representatives from the region's primary industry drivers.
- c. County and Industry specific focus groups will be conducted to determine county-specific demographics and issues. Based upon these findings, a regional industry specific focus group will be conducted to identify and confirm regional findings.
- d. Industry specific surveys and interviews will be conducted across the key industry sectors with a cross section of large, medium and small companies.

Our goal will be to assure that we have a statistically correct sample size that provides reliability and validity to our findings, while including a representative sample of companies from each county per industry sector.

4. Primary Research Plans

Our primary research plans include surveys, interviews and focus groups.

- a. We will use surveys and interviews to determine the specific occupational and skill shortage areas in each of the industry sectors considered key for Northern Indiana's current and future economic growth. This will require extensive time

with industry experts to identify the occupations that are and will experience shortages along with the number of positions within an occupational area that go unfilled as a result of the shortage. A similar methodology will be used to determine skill related issues.

- b. Our University Joint Initiative will be a key component of our primary research with staff. This group will analyze findings and determine what approaches are required to further validate findings, determine root causes and lead discussions groups with community leaders to identify appropriate regional solutions that are in concert with business and government related economic growth agendas.
- c. Focus groups will be the primary activity used to validate findings based on surveys and interviews. This will provide the opportunity, through group consensus that the findings are correct or are lacking in perspective and need additional information to be valid and reliable.
- d. Summaries will be used to present data to the Consortium for final consensus and approval.
- e. Additional methodologies deployed will be based upon recommendations from our University Joint Effort.

Strategic Skills Initiative EGR #2: Northern Indiana
Planning Activities and Schedule
August 5, 2005

Project Activity	Timeline	Staff Responsible & Agency	Effort/Work Hours	Product Produced (if applicable)
1. Hire Staff	July, 2005	President, NIWIB	15 man hours	Primary staff hired.
2. Form Executive Group and Consortia	July, 2005 – August, 2005	President, NIWIB	5 man hours	Executive Group formed and Consortia Members identified
3. Executive Group first meeting	August 2, 2005	President, NIWIB	10 man hours	SSI Briefing and Review and approve SSI Research application.
4. Complete SSI Research proposal	August 5, 2005	President, NIWIB	10 man hours	SSI Research application submitted to DWD
5. Consortia first meeting	August 30, 2005	President, NIWIB Vice President, NIWIB	10 man hours	SSI Briefing and Consortia Role
6. Conduct Occupational Skill Shortages activities: ➤ Primary Research ➤ Secondary Research analysis ➤ Research analysis and development of findings	September 6 – October 28, 2005	➤ President, NIWIB ➤ Vice President, NIWIB ➤ Research Asst, NIWIB ➤ University Research Support Group ➤ Corporation for a Skilled Workforce	800 man hours	Draft Occupational Skill Shortages Report
7. Complete Report	October 21, 2005	Vice President, NIWIB	40 man hours	Occupational Skill Shortages Report, Final Version
8. Present findings to Consortia	October 24-28, 2005	Vice President, NIWIB	5 man hours	Report approved with minor changes
9. Submit report to DWD	October 28, 2005	President, NIWIB	2 man hours	Report sent to DWD

10. Conduct Root Causes activities: ➤ Primary Research ➤ Secondary Research analysis ➤ Research analysis and development of findings	October 31 – December 28, 2005	<ul style="list-style-type: none"> ➤ President, NIWIB ➤ Vice President, NIWIB ➤ Research Asst, NIWIB ➤ University Research Support Group ➤ Corporation for a Skilled Workforce ➤ Walker Information 	800 man hours	Draft Root Causes Report
11. Complete Report	December 16, 2005	Vice President, NIWIB	40 man hours	Root Causes Report, Final Version
12. Present findings to Consortia	December 19 -22, 2005	Vice President, NIWIB	5 man hours	Report approved with minor changes
13. Submit report to DWD	December 28, 2005	President, NIWIB	2 man hours	Report sent to DWD
14. Conduct Solutions Analysis ➤ Primary Research ➤ Secondary Research analysis ➤ Research analysis and development of findings	January 2 – March 3, 2005	<ul style="list-style-type: none"> ➤ President, NIWIB ➤ Vice President, NIWIB ➤ Research Asst, NIWIB ➤ University Research Support Group ➤ Corporation for a Skilled Workforce 	880 man hours	Draft Solutions Report
15. Complete Report	March 3, 2005	Vice President, NIWIB	40 man hours	Solutions Report, Final Version
16. Present findings to Consortia	March 6 – 10, 2005	Vice President, NIWIB	5 man hours	Report approved with minor changes
17. Submit report to DWD	March 15, 2005	President, NIWIB	2 man hours	Report sent to DWD

18. Attend SSI Workshops	As Scheduled	Vice President, NIWIB Research Director	48 man hours	Learn new skills to institutionalize process.
19. Participate in SSI “Webinars”	As Scheduled	Vice President, NIWIB Research Director	16 man hours	Learn new skills to institutionalize process.



Strategic Skills Initiative Research & ID Grant
Line Item Budget Request

Economic Growth Region # ____ : _____

ITEM	AMOUNT REQUESTED
1. Staff Costs	
2. Consultant Assistance	
3. Travel Expenses	
4. Other Expenses	
TOTAL REQUEST	

1. **Staff Costs:** Prorated wages and benefit costs for that portion of time staff actively work on the project. Staff time charged to the project must be documented (i.e. time sheets).
2. **Consultant Assistance:** Costs for consultants assisting with the project. Include both consultant fees and expenses here. Please note that contracts for consultant services must meet all applicable state and local procurement requirements
3. **Travel Expenses:** Transportation (i.e. mileage), lodging, and meals (or Per Diem) costs for staff and other personnel (excluding consultants) participating in the project.
4. **Other Expenses:** Include costs such as: meeting room costs; purchase of data, reports, and materials; data processing fees; and printing expenses.

***NOTICE:** Attach a detailed justification for all requested costs by line item. The justification must explain what is being requested in relation to the work statement, as well as the “reasonableness” of the amount being requested – this is a critical piece that must be well developed in order for the state to determine final funding levels.

**Northern Indiana Workforce Investment Board
Economic Growth Region 2
Strategic Skills Initiative
Research and Identification Phase
Budget Narrative**

Staff Costs

Four staff will be involved in the Research Phase of the Strategic Skills Initiative (SSI). Three staff are new positions to ensure both institutionalizing of the processes associated with the Initiative and sustainability.

- President and CEO: will charge 50% of his salary to the SSI at \$21,323 for the six month period. Responsibilities include providing leadership for the SSI in the region, organizing meetings of the Executive Team and the Consortium, attending state-level meetings and training sessions, and promoting the activities of the SSI with key business, organized labor, education and community groups.
- Vice President of Strategic Research Services: will charge 100% of the salary to the SSI at \$37,917 for seven months beginning in August, 2005. Responsibilities include assisting the President in providing leadership for the SSI in the region, conducting primary research activities including surveying, interviewing and focus groups with key business constituencies, analyzing research data and preparing findings and recommended courses of action, preparing each of the required reports, conducting presentations on SSI activities, attending state-level meetings and training sessions.
- Research Director: will charge 100% of the salary to the SSI at \$21,000 for six months. Responsibilities include compiling primary research data, analyzing and preparing summaries of secondary research data, meeting with the University sponsored research team, preparing plans of action related to sustainability activities, making presentations on SSI activities, attending state sponsored training sessions.
- Administrative Assistant: will charge 100% of the salary to the SSI at \$15,000 for six months. Responsibilities include providing clerical and administrative support to the SSI Team, scheduling meetings and facilities, and related duties.
- Fringe Benefits: benefits are calculated at 35% of salary and include social security and medicare, health, dental and vision insurance coverage, life insurance coverage, short-term and long-term disability coverage, retirement benefits through TIAA-CREF, unemployment and workers compensation coverage.

Total staff costs equal \$128,573.

Consultant Assistance

- University Support Joint Venture: this venture will include representatives from the University of Notre Dame Economic Department, the University's Mendoza College of Business, The Indiana University at South Bend's School of Business and Economics and the University's School of Public and Environmental Affairs. This group will provide analysis and perspectives on the implications of primary and secondary research in the region. The group will assist the full-time staff and consortia in the development of solutions and recommendations. In addition, this approach will allow us to establish and build additional local capacity for labor market information research activities. Total cost of \$50,000.
- Corporation for a Skilled Workforce (CSW): The Corporation for a Skilled Workforce developed the two most recent State of the Workforce Reports for the Northern Indiana region, as well as prepared a similar set of reports for several Workforce Regions involved in the Illinois Critical Skills Shortages Initiative. CSW's involvement will be to assist the staff in the development of the required occupational skills shortage, root causes and solutions reports at a cost of \$21,000 for 120 hours of work. CSW is currently operating under a three year procurement.
- Walker Information: Walker Information will conduct a survey of 1,000 workers/employees in the region to obtain feedback from employees within specified companies/organizations. Focus of the feedback will be on employee perceptions specific to their jobs, training, and other related workforce content. Survey will be conducted using a web-based survey tool. Total cost equals \$22,500.
- Economy.Com: Contract to provide regional economic data as additional secondary data and analysis for the Initiative at \$5,500.
- Eriss Corporation: Contract for a regional job vacancy survey at \$13,454.

Total Consultant Assistance equals \$112,455.

Travel Expenses

Travel expenses include mileage for staff, travel to Indianapolis at a total cost of \$10,000.

Other Expenses

- Software: Includes additional licenses for new staff for Microsoft Office Professional, Executive Pulse software to support additional primary research activities in cooperation with local economic development entities in each county, chambers of commerce in each county and the employer services division of the regional WorkOne in conjunction with regional employers at a total cost of \$35,000. After first year, ExecutivePulse license is \$4,800 per year.

- Staff Development-IDWD/WA Workshops: SSI Workshops to support local retention of processes and knowledge from the Initiative at a total cost of \$9,950.
- Meeting Expenses: Includes expenses associated with meetings of the executive group, the consortia and meetings associated with primary research activities at a total cost of \$7,500.
- Equipment: Includes computers, printers and related items for new staff involved in the Initiative at a total cost of \$12,000.
- Furnishings: Includes desks, chairs, bookcases and file cabinets for new staff involved in the Initiative at a total cost of \$7,500.
- Administrative Expenses: Includes administrative expenses such as local fiscal agent fees, audit expenses, legal services and related expenses at \$36,000 or 10% of total budget.
- Programmatic Indirect expenses: Includes a pro-rata share of indirect costs, applied through the use of a cost allocation plan, of the grantee. Expenses include facilities, communications, consumable supplies, postage, copier, and other related expenses at \$38,000.

Total Other Expenses equal \$145,950.

Total request equals \$396,978.

Mailing List

Mailing ListID	First Name	Last Name	Organization Name
1	Juan	Manigault	Northern Indiana Workforce Investment Board
2	Jack	Isles	Bull Moose Tube
3	David	Findlay	Lake City Bank
4	Eric	Brown	Sheet Metal Workers Local 20
5	Jinny	Longbrake	Memorial Health Systems
6	Michael	Patton	Urban League of South Bend
7	Lyn	Batzer	Ivy Tech State College
8	Fred	Carmel	Vincennes University
9	John	Booker	Nat. Assoc. of Directcare Workers of Color, Inc.
10	Debbie	Berger	JobWorks, Inc.
11	Ann	Rollman	Miller's Health Systems
12	Dawn	Chapla	United Way of St. Joseph County
13	Lester	Fox	Real Services, Inc.
14	Carl	Kaser	United Auto Workers Local
15	Barkley	Garrett	Indiana Economic Development Corporation
16	Fred	Lanahan	Indiana Dep.t of Workforce Development
17	Alan	Limerick	NE IN. Carpeners Joint Apprenticeship & Training
18	Kimberly	Nance	Kosciusko Development, Inc.
19	Kathy	Sokolowski	USDOL Bureau of Apprenticeships & Training
20	Natasha	Tomlinson	Shaffer Gear Works, Inc.
21	Paul	Laskowski	Chamber of Commerce of St. Joseph County
22	Glenn	Williams	Laborers International Union
23	Howard	Blackwood	WorkOne Northern Indiana (Regional)
24	Pat	McMahon	Project Future
25	Doug	Anspach	Marshall County Industrial Foundation
26	Bill	Bradley	Economic Development Corporation
27	Phil	Penn	Elkhart Chamber of Commerce
28	Dan	Daugherty	Goshen Chamber of Commerce
29	Brad	Bishop	Zimmer Corporation
30	Darlene	Whaley	Bio-Met Corporation
31	Earl	Hanlin	DePuy Corporation
32	Gary	Wuslich	AM General
33	Kurt	Meyer	Elkhart General Hospital
34	Cindy	Fuja	Madison Center
35	Jay	Caponigro	Robinson Center
36	Allison	Heyde	Rochester Chamber of Commerce
37	Mae	Reck	IUSB
38	Debie	Coble	Goodwill Industries
39	Andrew	Dexter	Dexter Axle
40	Christie	Poe	Maple Leaf Farms
41	Lisa	Stefanko	Dean Foods Company
42	Jim	Krzyzewski	Nyloncraft
43	Bill	Montgomery	US Probation
44	Katherine	Baert	Smurfit-Stone Container Corp.
45	Lynn	Nemeth	Sign-A-Rama
46	Natascha	Tomlinson	Shafer Gear Works, Inc.

Mailing List			
Mailing ListID	First Name	Last Name	Organization Name
47	Donna	Wagoner	Saint Joseph Regional Medical Center
48	Debbie	Remble	Memorial Health System
49	Maureen	Johnson	Holladay Properties
50	Stacy	Groms	Peoplelink
51	Lynn	Forrest	Star Staffing
52	Shelly	Arch	Cintas
53	Geoff	McCuen	Elkhart General Hospital
54	Mark	Nelson	Gunite Corporation
55	Karen	Dady	Dalton Corporation
56	Greg	Morris	Rosewood Terrace
57	Patty	Baker	Utilimaster
58	Suzanna	Randall	Dutchman Manufacturing
59	Carol	Caviness	Elkhart County
60	Stephen	Luecke	City of South Bend
61	Jean	Perrin	Ivy Tech State College
62	Nathan	Kimpel	New Energy Corporation